



ISU Management Guide

Q1'17

[See what's new >](#)



Our stores use our amazing technology to help customers every day. It is up to all of us to maintain these devices and to use them within Apple policy.

When reviewing quantities with the ISU Calculator be reasonable and sensible. Only use what is needed, don't exceed the limit. If you don't have the right number of devices partner with your Leadership Team and Field Leader for advice before requesting authorisation via Store Support.

What's New?

The major changes to the ISU Management Guide are summarised and linked to below.

Highlights:

- [Additional ISU](#) section has been rewritten with more detail based on feedback from stores
- New section added: [Third Party Software](#)
- Additional information has been added to [ISU Calculator](#) section
- [References](#) page has been updated
- Updated terminology including new roles and areas in store

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What is ISU?

Overview

In Store Use (ISU) devices include iPad, iPhone and Mac that are used by teams to support daily operations. For example, RetailMe iPad devices for training and Downloads or Visual Merchandising Portable Mac computers for imaging Demo devices. This section will provide some detail around the different types of technology we have in our stores and what makes them ISU.

ISU or Demo?

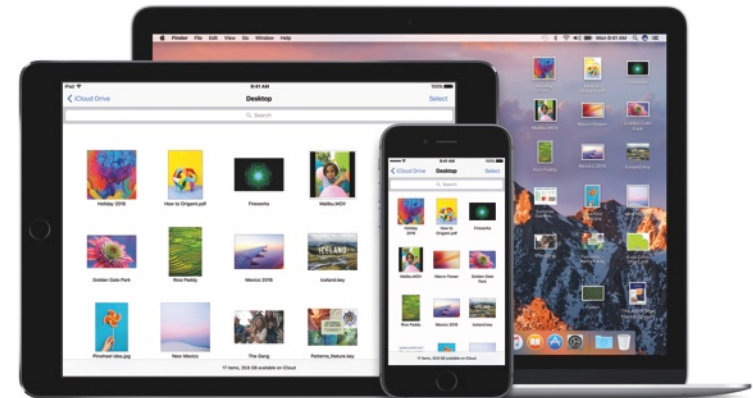
Dependent on its use, technology will be moved to either ISU or Demo. Some examples for Demo include the devices displayed in the Product Zone for customers (iPad Pro, Apple TV and iPhone). These will need to be imaged with the correct Demo image to be presented to customers. ISU equipment is used by teams to support tasks and operations in stores. These tools will be imaged with systems provided by either IS&T or Retail Technology.

Imaging Devices

ISU devices will be imaged with data security as a priority because they will be handling customer information. This means updates will not be as frequent. All ISU must be imaged and must not be setup with employee data.

Comparitively, Demo Products in the [Workshop Equipment List](#) will always be imaged with the latest OS and will be updated to reflect our current product range.

The Genius Bar Troubleshooting iPhone can be unlocked by following instructions in GSX article RS100.



ISU or Expense?

Stores often require accessories for use in Genius Bar appointments or with ISU devices. If these accessories were recorded as ISU inventory then managing and auditing a store's ISU would be significantly more difficult. For this reason, approval to expense [specific accessories](#) has been given. These expensed items become non-inventory and will no longer be audited with the rest of a store's ISU equipment.

Overview

ISU devices are inventory just like the products sold to customers and the service parts used at the Genius Bar. Backstage teams manage this inventory in a system called [Retail I/O](#) or Rio for short. To successfully maintain ISU inventory, the whole team must support the organisation and standards set for these products.

Retail I/O (Rio)

The inventory system Rio is used to view and edit ISU devices in store. Employees with SAP Retail access will be able to add, remove and edit devices in Rio. Preservation & Operations Specialists and IS&T Champions have the access to edit specific information about ISU devices that will affect the functionality of a device. Everyone is able to view all of the ISU inventory in their own store.

Rio Categories

ISU inventory can be organised in Rio using locations, groups and categories. Locations and groups are useful for auditing ISU inventory and help Backstage teams manage this in store. Categories provide vital information about the device's use and will have the following effects:

Available Part Numbers

Categories can only be assigned to specific part numbers. For example, the ISU Speakers Category will only allow stores to assign a Beats Pill Speaker. These restrictions are set by Global Retail Support to align stores across Geos

Imaging Process

To ensure the correct image is installed on a device, it must be in the Category assigned to that image

Network Connection

The devices that can connect to the secure Argon network are managed by its Category. Isaacs and Apple Store Pickup notification devices are examples that can only connect to Argon due to their Category

Requesting Additional ISU

Category limits are set in the ISU Calculator. If a store requests additional ISU and their Category limits have been reached, further investigation will be required to reassign devices before assessing the request for additional inventory

Incorrect Asset Category is a status in Rio that means an item is either the incorrect part number for an ISU category, or that the category has been deleted from the Rio system. When devices have this status, they must be moved to another available category or RTW.

Quantities

The number of ISU devices allocated to stores has been calculated by Global Retail Support based on headcount, store layout and store trends. Headcount affects Isaac, RetailMe iPad and Genius Bar iPad devices. Store layout decides how many Backstage Workstations and Visuals devices are allocated. Store trends will impact decisions for devices such as Carrier iPad and will be used to guide future changes in overall quantities. These quantities are detailed in the ISU Calculator, which is available on RetailMe, (see [References](#)).

Follow the [ISU Calculator](#) to determine the limit of available ISU inventory for any item.

Do

- Keep iOS ISU devices charging when not in use
- Clean ISU products as often as Demo products
- Keep iPad devices in Smart Covers to preserve their cosmetic condition
- Use the ISU Calculator to determine limits

Do Not

- Store ISU devices in lockers or keep hold of ISU throughout the day
- Relocate Backstage Workstations without approval
- Assign ISU technology to individual team members
- Track expensed product in Rio

Looking after ISU

It is important to maintain the store's ISU inventory in both standards and functionality. ISU technology is for everyone in store and is everyone's responsibility maintain. When devices stop working or get damaged, timely communication and action will reduce the time that stores are without the technology they need. Teams should not wait until they have a lot of damaged devices before following the process to repair or replace them.

A focus on employee behaviours can improve the lifespan of ISU technology, reduce time spent without access to these devices and reduce the cost to Apple of replacing ISU devices excessively.



Overview

Properly managing ISU inventory can be a challenge. Knowing when devices should be replaced or upgraded, returned to warehouse or repaired introduces a lot of questions. Following this guide will support stores in making the right decisions and follow Policy.

Additional ISU

If a team feels they need more ISU inventory than is allocated, it is important to work with the Leadership team to identify where this need has come from. Check that all allocated devices are functional and available to the team that needs them. Store Leaders can provide guidance on how existing ISU can be best utilised, but can't override Limits or part numbers in the [ISU Calculator](#). These are managed by Global Retail Support.

If all allocated ISU inventory is available and a store still requires more, partnering with an IS&T Field Leader can be beneficial. If additional ISU inventory is still required, an [Escalator](#) can be submitted to request this.

Some accessories that are used with ISU devices may not be in stock in a store, but will still be available to request through the Backstage app.

End of Line ISU

Replacing defective or damaged ISU devices with EOL inventory will not be possible. There will be a period of time when EOL product can't be requested from RFO, and new products are in the process of being approved for ISU. During this time, stores can only repurpose existing ISU.

Communication will come from Global Retail Support via RetailMe to inform stores when a different part number can be used.

It is vital that replacing ISU is done in a timely manner to avoid stores being unable to replace defective devices during EOL periods.

Updates to ISU

If stores have previous generation ISU devices they should not replace unless directed to by Global Retail Support. Updates are managed centrally to ensure compatibility and maintain inventory levels. The impact of a store replacing one device may seem small, but if every store did this it would have a significant impact.

Upgrade tasks will appear in RetailMe and will have clear instruction from Global Retail Support regarding how and what to upgrade. **Any upgrades outside of these tasks are not permitted without approval.** Apply the same decision making to accessories expensed to be used with ISU devices. Consider the environmental impact of decisions in store. When upgrading, older devices must be RTW.

For computers that are running slowly, stores should contact the IS&T Helpline to troubleshoot any software issues before considering updating hardware.



Repair or Replace?

When there are issues with ISU equipment, follow guidance on GSX - Article RS76. This will provide direction to repair or replace ISU devices within policy.

Remember to keep hold of any SIM cards when replacing ISU iPhone devices.

Overview

ISU devices are carefully selected to balance the needs of the software requirements, compatibility, cost and Employee and Customer experience. It is important that stores follow guidance on which specific part numbers can be used for each device and not upgrade them or the software unless instructed to do so by Global Retail Support or IS&T.

The focus on staying within ISU Calculator Limits and correctly categorising these items is to support a future system update where this will be controlled by Rio.

Limits not Targets

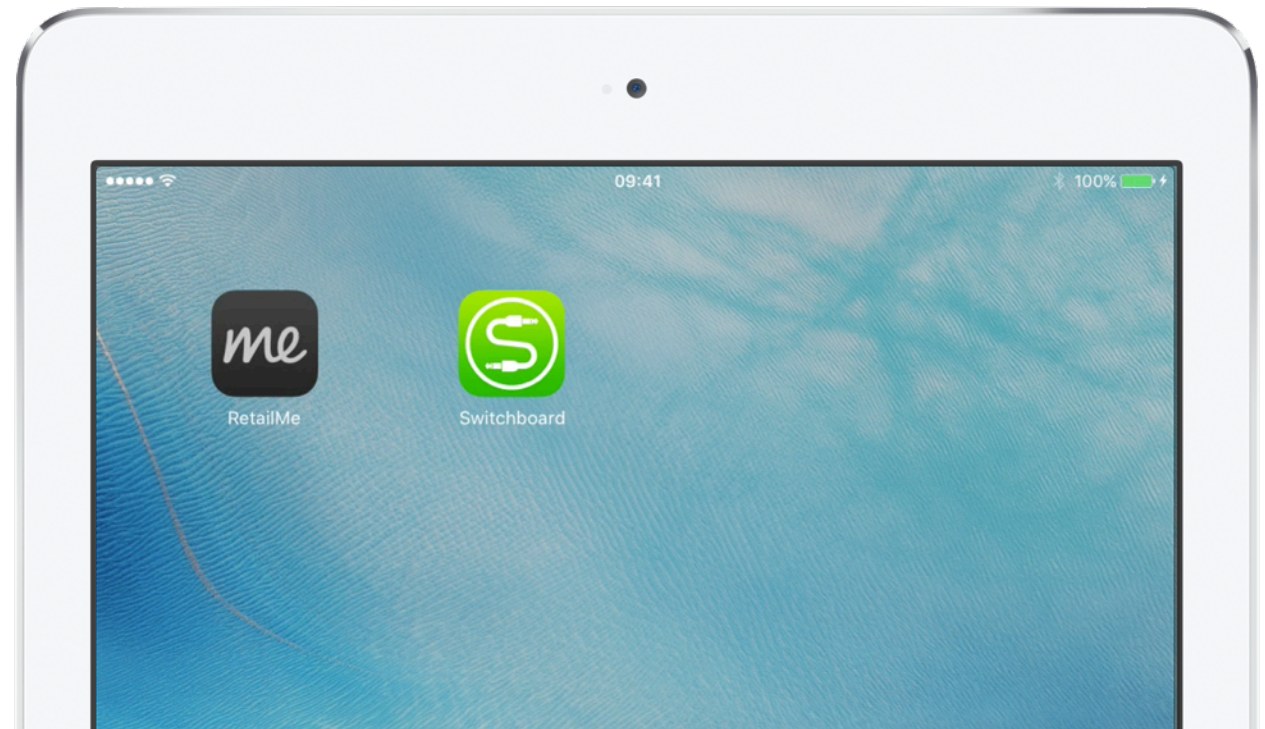
Using the ISU Calculator, stores can review the quantity limit for each device and category. The limit number is the maximum amount a store can have but could have less if they are not required. The quantities are calculated based on a number of factors including store headcount and usage requirements. These are reviewed quarterly to maintain adequate resources for stores.

If more devices are required for a particular purpose they can be moved between categories but the overall device limit should not be exceeded. For example, if during a launch more Carrier iPad devices are required teams could repurpose RetailMe iPad to Carrier iPad.

Different iPad for Different Use

When ISU iPad devices are setup, they are managed by Profiles installed on them. Profiles can change how devices connect to networks, which apps can be used and how the iPad functions. Profiles conflicting is why stores cannot have everything installed on one iPad.

As an example, MobileGenius will use the camera to read barcodes, but installing the profile to connect to the Argon network will disable the camera on an iOS device for security reasons. This means stores would not be able to use all the features of MobileGenius and connect to Argon on the same iPad.



Overview

Accessibility features built in to Apple technology can be utilised in ISU devices to support the needs of teams. There are many ways this can be achieved and we are continuing to improve the integration of accessibility into ISU devices.



Getting extra ISU for Accessibility

If a store has an employee with accessibility requirements, they should e-mail Store Support with details of what devices are required and the intended use.

ISU quantities for a store can be adjusted where appropriate to align with these requirements. This will always be assessed on an individual basis.

Apple Watch

Paired with an ISU iPhone, the Apple Watch can provide haptic alerts to notify the wearer. Team members with accessibility needs who work with Runner or Apple Store Pickup can benefit from Apple Watch.

VoiceOver in EasyPay

The screen reading functionality of VoiceOver will support blind or low vision users in the EasyPay app. This is built into iOS and the EasyPay app so can benefit any team member who uses EasyPay.

iPad as a Communication Device

Employees with speech impairments can benefit from using an ISU iPad as communication devices. It is important that no customer data is retained on these devices.

Improving Accessibility support is ongoing and we are interested to hear how ISU technology can work with this. Use Share Your Ideas in RetailMe if you have any feedback on making Apple technology support teams in new ways.

Out of Store and AOU

Overview

ISU devices are designed to be used within the walls of Apple Retail stores, but there are exceptions. When ISU inventory leaves the store, it is important that strict procedures are followed to ensure we are protecting Apple's confidential data. Only specific ISU devices are permitted to leave the store and there is a detailed process for each time this happens.

ISU Eligibility

The only devices that can go out of store are "Joint Venture Loaner" and "Hiring Portable" portables. When these devices leave the store they must be correctly setup so confidential data isn't shared.

The Joint Venture Loaner devices are managed through MobileGenius and information about the case associated can be viewed in Rio. The Hiring Portable needs to be manually "checked out" in Rio. The location needs to be changed to "Out of Store" and notes added to explain who is using the Hiring Portable and for how long. The Hiring Portable is also assigned for training purposes where required e.g. hosting Market Core.



Apple Own Use (AOU)

Global Retail Support will provide non-inventory devices to certain roles in store. These devices are not managed or visible in Rio, but are recorded by Global Retail Support before they are sent to stores. Other than these devices, individuals should never be assigned their own ISU inventory.

Preparing for Out of Store

Joint Venture Loaner portables should be completely erased so that each customer using this device is greeted with a fresh computer.

Hiring portables must only have the necessary information to host the event they are being taken to. The image that should be used on these devices is the same as a FOH Demo (Deep Frozen). Documents should be added via [Attaché](#) in a frozen state so that if the machine is rebooted, the internal data is lost. Hard drives must not be used to transfer data between ISU computers. It takes time to securely erase a portable so prepare for these out of store events in advance.



Overview

It is important to protect customer and employee data and ISU devices are managed to support this. Confidential data is protected by your AppleConnect. Only apps downloaded via Self Service or Switchboard for are permitted for use on ISU devices. For ISU Mac computers, approved applications are installed and managed by IS&T. Requests for additional software should be submitted via the IS&T HelpLine.



Third Party Software

Any software installed on computers in ISU must be installed by IS&T. No other third party software is approved for use as this puts Apple's confidential data at risk and has not been licensed to use in store. Personal licenses or licenses obtained from the Source must not be used on Apple Owned systems.

File Sharing

To protect confidential information, cloud or file-sharing applications should never be used on ISU Mac computers or mobile devices. Backstage Workstations are able to securely share files over ethernet on the BOH Network. To move files between Backstage Workstations and non-IS&T Managed systems, [Attaché](#) should be used.

Personal Apple email accounts should not be set up on any mobile or portable ISU devices. Examples of other tools that should never be used on ISU devices include Dropbox, Evernote and Google Docs.

Securing Devices and Data

You are responsible for all activity conducted under your AppleConnect or within your email. Logout from all applications and sites when not in use or when a device is unattended.

Before sending a Mac back via the RTW process it should be erased using the seven-pass security option. Loss Prevention should be contacted immediately if an ISU device is lost or stolen.

iCloud and ISU

Personal iCloud accounts must not be used on ISU devices, nor should custom iCloud accounts be created for this purpose.

It is important that personal devices are not used to perform Apple business. Apple e-mail or Calendar accounts should not be used on personal devices.

Overview

For stores to properly manage their ISU inventory, they need to know which devices they should be using and how many. The ISU Calculator available on RetailMe will provide this detail for each store. The quantities are updated on a quarterly basis. Below is an explanation for the different areas of the ISU Calculator.

Macros must be enabled when opening the ISU Calculator for the Store Selector tool to function

Store Selection Tool

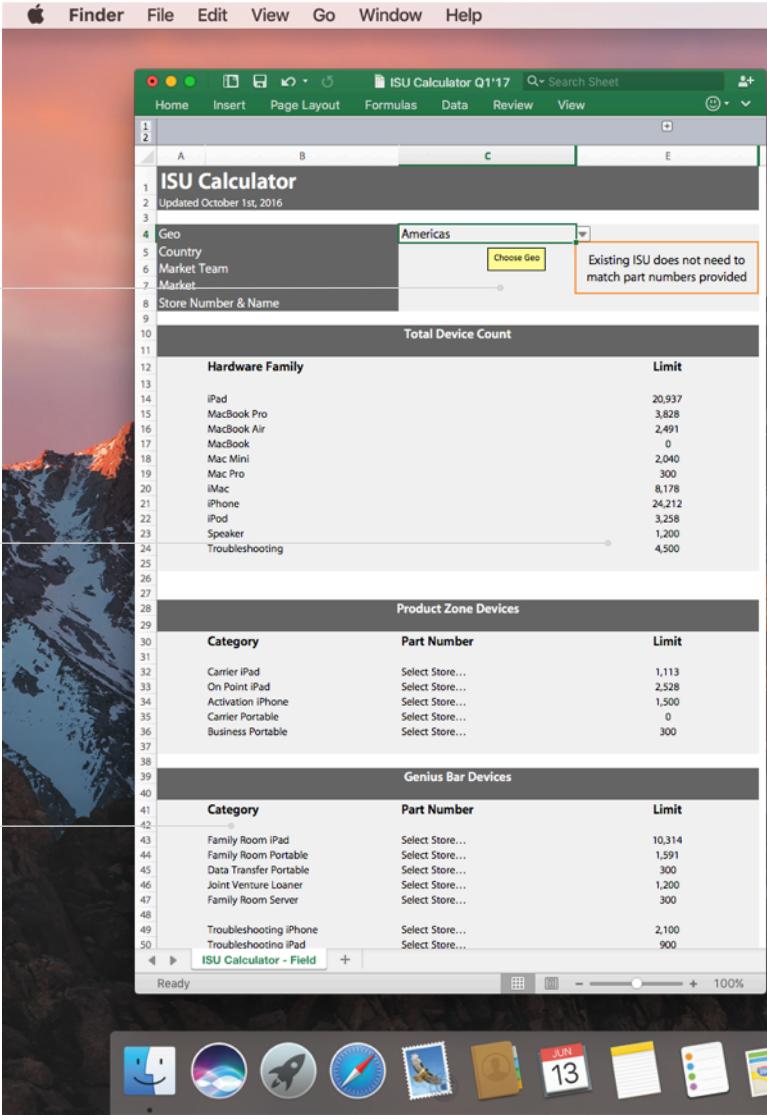
Dropdown boxes that allow you to get quantities for a specific store

Total Device Count

Section displaying Limit and Actual quantities across all areas

Category

Displays the Rio category names



ISU Calculator

ISU Calculator

Updated October 1st, 2016

Geo: Americas

Country: Choose Geo

Market Team: Existing ISU does not need to match part numbers provided

Market:

Store Number & Name:

Total Device Count

Hardware Family	Limit
iPad	20,937
MacBook Pro	3,828
MacBook Air	2,491
MacBook	0
Mac Mini	2,040
Mac Pro	300
iMac	8,178
iPhone	24,212
iPod	3,258
Speaker	1,200
Troubleshooting	4,500

Product Zone Devices

Category	Part Number	Limit
Carrier iPad	Select Store...	1,113
On Point iPad	Select Store...	2,528
Activation iPhone	Select Store...	1,500
Carrier Portable	Select Store...	0
Business Portable	Select Store...	300

Genius Bar Devices

Category	Part Number	Limit
Family Room iPad	Select Store...	10,314
Family Room Portable	Select Store...	1,591
Data Transfer Portable	Select Store...	300
Joint Venture Loaner	Select Store...	1,200
Family Room Server	Select Store...	300
Troubleshooting iPhone	Select Store...	2,100
Troubleshooting iPad	Select Store...	900

Limit

The maximum quantity a store can have in ISU

Part Number ****UPDATED****

Displays current part number used for ISU. Part numbers do not include the country specific suffix (LL/A or ZM/A for example)

The **Part Number column** in the ISU Calculator is there to show which part should be used when replacing a defective or damaged device in ISU. It does not mean all devices in ISU should be upgraded to this part. See ["Updates to ISU"](#) for more information.

References

All of the relevant resources and where to find them

Inventory

ISU Calculator

Expensed Product

Retail I/O

Genius Troubleshooting Devices

ISU Request Escalator

Materials > Back of House > In-Store Use

bohprocesses.apple.com > Other and Misc > Expensed Product

retail-io.corp.apple.com

gsx.apple.com > RS100

escalator.apple.com > Escalator

Setup

Back of House Imaging Guide

Configuring the Visual Merchandising Portable

Configuring Genius Bar Floater Systems

Workshop Equipment List

Replacing or Repairing In-Store Use (ISU) Systems

Materials > Back of House > BOH Processes

Materials > Visual and Imaging > Demo Systems > Mac Setup Procedures

Materials > Family Room > Family Room Operations

Materials > Workshops and Events > Workshops

gsx.apple.com > RS76

Standards

Back of House Standards Guide

Technology Station Setup Guide

Materials > Back of House > Preservation

Materials > Back of House > In-Store Use

Policy & Security

Systems Policy

Protecting Payment Devices

IS&T Procedures

Attaché

Materials > Policy & Procedure > Systems

Materials > Policy & Procedure > Systems: Resources

istweb.apple.com/retail

attache.apple.com

Rio Category Purposes

This will provide the purpose of each available Rio Category

Product Zone Devices

Carrier iPad	Used by all employees to display and process carrier plans and activation, and for Finance applications
On Point iPad	Used by Leaders and On Point roles to manage customer journey and daily operations of the store
Activation iPhone	Used by Product Zone team to contact carriers, finance partners and to support launch events
Carrier Portable	Used by all employees to display carrier plans (certain countries only)
Business Portable	Used by Business teams (in Backstage only) for Engage access. Setup with a managed KTA image

Genius Bar Devices

Genius Bar iPad	Used by Geniuses, Technical Experts, Technical Specialists, Creatives and Genius Admins to manage Genius Bar and Training customer experience
Genius Bar Portable	Used by Geniuses, Technical Experts, Technical Specialists and Genius Admins to support the Genius Bar experience including HDI process
Data Transfer Portable	Used by Geniuses, Technical Experts, Technical Specialists and Genius Admins in the data transfer process
Joint Venture Loaner	Loaned to Joint Venture customers during Genius Bar repairs
Genius Bar Server	Provides diagnostic and imaging resources for use with customer machines (Located in GR)

Operations Devices

Visual Merchandising iPad	Used by all employees to access store planograms
Visual Merchandising Portable	Used by all employees to image Demo devices
Operations iPhone	Used by P&O Specialists and IS&T as a direct line into store
Alert Device	Connected to speaker to alert teams of Runner Request notifications
Alert Device Argon	Connected to speaker to alert teams of Apple Pickup notifications
ISU Speakers	Connected to Alert Devices, and for use in Technology Stations